

CASE REVIEW INSTRUMENT VOCATIONAL EVALUATION

Client Name:	VR Staff:
Reviewer:	Date:

Impairment(s):

Referral Date:

First Meeting Date:

Date Completed:

QUESTIONS	Y/N/NA	COMMENTS
1. Is the referral form in casefile with reason for referral documented?		
2. Was the team service for Vocational Evaluation and/or Community Assessment included in the Assessment Services screen?		
3. Was the time from referral to client's first scheduled appointment within 15 days?		
4. Was an interest activity or assessment completed/documented, demonstrating the clients interests and preferences were acknowledged?		
5. Were assessment activities administered appropriately for the client's situation? Were results documented?		
6. Were any Rapid Engagement activities recommended?		
7. Has the evaluator identified short-term or long-term job goal(s) and/or recommendations upon completion of the evaluation?		
8. If a job goal(s) was identified is it consistent with the client's impairment and restrictions?		
9. Were the job readiness/planning factors and work characteristics considered?		
10. Were appropriate recommendations made regarding the job readiness/planning factors and work characteristics?		
11. Is an evaluation summary with recommendations documented in the Vocational Evaluation Report in QE2?		
12. Was the Vocational Evaluation Summary Report completed within ten days from date evaluation was completed?		

Case Review Instructions-Vocational Evaluation

The Case Review Instrument for Vocational Evaluation should be utilized when reviewing Specialist casework completing vocational evaluation services.

1. Was the referral form in the case file and reason for referral clearly specified?

2. Was the team service for Career Planning and/or Community Assessment included in the Assessment Services screen?

- To ensure this standard is met, the team service for career planning and/or community assessment should be identified under Assessment Services under the Assessment Tab in QE2. It should accurately report the current status of the service (i.e. proposed, scheduled, completed, etc.)

3. Was the time from referral to client's first scheduled appointment within 15 days?

- The standard is the scheduled date for the client to attend evaluation within 15 days from the date of referral. If the evaluation was started within 15 days the standard is met. Also, if the originally scheduled start date was within 15 days but the client did not keep the scheduled appointment, the standard was met. If the client chose to extend the start date past 15 days indicate N/A. The date of referral for evaluation services should be identified on the Evaluation Referral Form.

4. Was an interest activity or assessment completed/documented, demonstrating the Client's interests and preferences were acknowledged?

- Client interest shall be the guiding factor for the entire evaluation process. Were other options revealed to the Client or previously identified occupations confirmed?

5. Were assessment activities administered appropriately for the client's situation?

- Were interests, disability factors, education level, criminal background, etc. considered for the client's unique situation?

6. Were Rapid Engagement activities recommended?

- The Reviewer should consider if a REA would have been beneficial and if so, was one completed? It is critical to recognize every client is ready for some degree of work and should be observed in a community setting if at all possible.

7. Has the Evaluator identified either a short-term or long-term job goal(s) and recommended next steps?

- The Evaluator must identify a job goal or recommendations for next steps in the Vocational Evaluation Report. The recommendations may be observations regarding what was noted during the evaluation and how it will affect future VR services and placement.

8. If a job goal(s) was identified is it consistent with the client's impairment and restrictions?

- Review Client's restrictions documented in the case file. Ensure these restrictions are consistent with the job goal being recommended. If no job goal is recommended, were additional career activities suggested?

9. Were the job readiness/planning factors considered during the assessment?

- Is there evidence the Evaluator/client understood the client's job readiness/planning factors and work characteristics? The Evaluator will need to review all available case file information to determine the readiness/job planning factors were identified and taken into consideration during the assessment.

10. Were appropriate recommendations made regarding the job readiness and planning factors?

- Is there evidence the Evaluator made appropriate recommendations regarding the job readiness/planning factors and work characteristics identified? The recommendations should be documented in the Vocational Evaluation Report.

11. Is an evaluation summary with recommendations documented in the Vocational Evaluation Report in QE2?

- A Summary and Recommendations section must be documented in the Vocational Evaluation Report and clearly state client interests. Short and long term goals shall be identified along with a list of 'Next Step' activities to provide structure for the client. Was the documentation such that it appeared VR did not solely decide the job goal without client participation?

12. Was the Vocational Evaluation Report completed within 10 days?

- The evaluation report is expected to be completed within 10 days from when the client finished evaluation.